

MAKING YOUR EVENT A SUCCESS

Practical advice and
best practices

GIMBEL &
ASSOCIATES

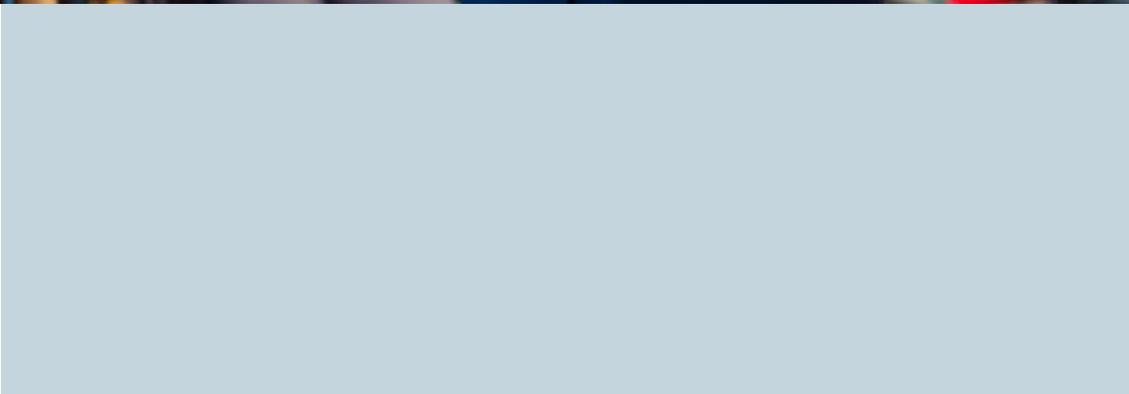


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EVENT MANAGEMENT



INTRODUCTION

There's no promotional investment that can make a bigger impression on customers and prospects than the personal interaction made possible with live events. Taking part in live events, whether you host them yourself or contribute as a panelist, are great ways for print service providers to achieve their goals for new business development, launching new product lines, or expanding business relationships.

At events you can get a better understanding of your customers' needs and challenges and your customers can see firsthand how your solutions can help them meet their business objectives.

You can find plenty of event planning guides on the internet, but none of them are written specifically for print service providers. The advice in this eBook is the product of Gimbel & Associates' work with clients just like you. We've designed events and assisted many print service providers as they execute their live events. In this book we present our collection of best practices.

Use this end-to-end guide to plan, market, and execute events. You'll be able to leverage global best practices to market your event at the local level. This guide provides detailed tactics, timetables, and tips organized in individual sections to help make each event a success.

BONUS: We've included templates, checklists, and design suggestions for the materials you'll need to promote your events, run them, and follow up. Use these tried-and-true resources to save time and jumpstart your event plans. See Files at the end of this book for these useful items.

Open houses, seminars, webinars, conferences, and local events each have specific logistical challenges, but they share a single common characteristic; their success relies on solid marketing, communications strategies, and comprehensive planning. You must attract an audience of sufficient size populated by decision-makers, recommenders, and influencers to make live events pay off. Just as important are detailed plans and clearly defined objectives that you communicate and reinforce throughout your organization.

Gimbel & Associates has collected ideas used by many print service providers and included the best in this eBook. In this guide you'll find instructions and tips for activities that happen before, during, and after an event. Every event is unique, but the basic framework we've suggested will save you time and money. Putting on a customer event is a lot of work. Don't start from scratch when you can build your event with the methods we've included in this book.

Our goal is to provide you with all the information you need to manage your own events. If you need extra help though, please contact us at info@rogergimbel.com. We can fill in the gaps you might have in your event planning and execution efforts or even participate as industry expert speakers.



EVENT SUCCESS STRATEGIES

Some details listed below apply mostly to open houses and print company hosted events. Many, however also come into play when you will represent your company at a seminar, webinar, or conference hosted by another organization. Specific guidelines for each type of event follow this section.

IDENTIFY YOUR EVENT GOALS

Before you start planning your event, you must be clear on what you hope to achieve. These goals should be specific and measurable. A goal of “getting more business” is too vague - there’s no way to tell if you succeeded!

Effective goals include statements like these:

- Attract at least 30% of our current customers and 10 new prospects to our event
- Expose customers and prospects to expanded capabilities and new technology
- Engage current and future customers in discussions about new projects/programs
- Demonstrate creative digital solutions
- Educate customers about a specific service or offering
- Build confidence that your company can handle today’s customer demands
- Engage prospects in understanding program-based opportunities

If one of your objectives is related to attracting more work, then lay out what that means. Try goals such as:

- Get commitments for follow-up sales calls from at least 5 new customers
- Identify ways to expand our services with at least 3 existing customers
- Add 10,000 repetitive monthly impressions to our digital inkjet production line

Most companies find they are most successful if they limit their goals to two or three. Keep the focus narrow to allow you to reinforce your objectives with your staff and plan the event to encourage customer actions that result in movement towards the goals.

Don't make the mistake of including only what your organization wants to accomplish. Consider outcomes important to your event attendees as well. You must give your customers and prospects a good reason to show up. A free lunch and a chance to win door prizes won't do it. Everyone is busy. Expecting your customers to give up their time to attend your event may be a big ask. As you market your event, stay focused on the benefits to the attendees.

Describe specific goals to help you decide how to market and advertise the event, select which of your employees will play roles before and during the event, create incentives for your staff, and more.

See the Swipe Files at the end of this book for a template that helps you identify the reasons for holding an event and clarifying the expected outcomes.

CONTENT STRATEGY

Your objectives and the target audience will drive the theme of your event.

Industry-Focused - Use this theme to target customers in a specific vertical market or industry. Printing companies that have developed expertise serving particular industries might host an event tailored for real estate brokers, health clinics, utilities, or credit unions, for instance. Your event content and marketing materials will use industry terminology and cover topics important to the selected industry.

Application Focused - These events highlight your products or services. You might focus on areas such as variable data inkjet, multi-channel marketing, customer acquisition, retention, or customer experience improvement programs. These applications are consistent across industries and therefore open your event to a wider audience.

Partner Focused - For these events the emphasis is on how your printing operation works with other companies to produce results for your customers. Show customers how your partnerships allow you serve them with comprehensive solutions that wouldn't be possible on your own. Your partners will participate in planning the event and will normally provide speakers and other resources.

Theme choice is an important planning step, but some organizations find it difficult to nail down exactly what their event will be. We are always available to assist, so don't let your inability to concisely define your focus dissuade you from moving forward. Gimbel & Associate experts are here to help.

EXTERNAL COMMUNICATION PLAN

Ten to twelve weeks before your event you need to start working on attracting the audience identified by your objectives and theme. Inviting current customers or prospects with whom you already had contact is fairly straightforward. You should have all the contact information you need for these groups.

You'll probably want to widen your scope to attract attendees that may not be familiar with your company and aren't in your files. Print service providers have an advantage over other businesses as you or your partners can promote your event using the familiar channels and tools used for customer campaigns you run every day.

Send press announcements to local and regional business publications to inform attendees. Even if they don't come to your event, the press announcement will have educated potential customers about your products and capabilities. You'll find a sample press announcement in the Swipe Files.

Contact list brokers to acquire mailing lists of other possible attendees. This is effective for industry-focused events. You can target prospects within geographic areas based on SIC codes to connect with only those firms that match your industry focus.

A simple adjustment to your email signature to include event dates and topics can spread the word through your regular correspondence. You can include a link to an online event information and

registration page in the email signatures of employees corresponding with contacts outside your company.

Mention the event in blogs, industry forums, social networks, and e-bulletins. Post ample details in the News and Events section of your website and add promotional information to rotating website banners or pop-ups. Be sure to always link to the event registration page on your website.

Buy banner ads on websites aimed at your identified audience.

About six to eight weeks before your event, send save-the-date postcards to all contacts matching your attendee profile. Prepare other direct mail materials to send to your contacts in subsequent weeks. Print extra quantities of promotional materials for your field sales people to hand out personally and remind them to talk to their prospects and customers about the event. Leave a supply of promotional material in your reception area as well.

If you have invited the relevant media (and you should), distribute press packs to them to encourage their attendance. We've listed typical contents for a press pack in the Swipe Files.

Three weeks before your event, start calling contacts who have not yet registered. One week before the event, send reminders via email.

INTERNAL COMMUNICATION PLAN

Print companies sometimes neglect to produce communications to inform the staff about the strategy behind hosting or taking part in the event. Regular updates should relate your team's progress towards project goals. We recommend a planned series of internal bulletins to ramp up enthusiasm among employees. Meetings with department managers will ensure they fully understand the organization's purpose and objectives. Keeping the managers engaged guarantees participation and acceptance of responsibility for their roles in producing positive outcomes.

Even participating in seminars, webinars, or conferences benefit from an internal communications plan. Keep everyone informed and allow subject matter experts within your organization to assist with producing content, publicizing your participation, and preparing for fulfillment or follow-up activities.

EVENT BUDGET

You can run successful events on a moderate budget. The amount you will spend depends on the how much you can do in-house. Outsourcing event management services will be more expensive, as will hosting the event outside your facilities at hotels, restaurants, or other venues.

We recommend planning for expenses to include food, beverages, outbound communications, guest speakers, audio, video, promotional products, signage, uniforms, name tags, etc. Managing the budget will enable you to realize an attractive return on your investment.

Seminars and webinars are generally low-budget events. Conferences, however, are more involved and may include participation by multiple employees and printed collateral. If you will be co-presenting with a customer, you'll generally need to budget for their travel and meals.

DATA REQUIREMENTS

Besides the names, addresses, and emails for potential attendees, we recommend gathering data necessary for personalized communications. This may include gathering data like phone numbers, job titles, and vertical markets. You might have stored this information in multiple, unconnected systems

and not in a centralized CRM. You may take advantage of outside data sources to augment the data you can acquire from your own databases.

Be sure to review the data for accuracy before producing customer-facing communications. Misspelling a customer's name or company is a sure way to cool down customer enthusiasm.

EVENT LOGISTICS

Logistical details include determining where guests will enter the building, where they will park, and who will greet them. You must decide if you will provide an agenda, name badges, literature, or other items when guests arrive. If a tour or demonstration is part of the event, be sure your guests will be able to hear the speakers and move safely about the facility.

Plan for an area where you will serve food and drink, where to store coats and bags, when you should pull names for prizes, and where speakers will make their presentations. Be sure to plan a traffic flow that accommodates late arrivals and early departures.

Seminars and conferences include far fewer logistical items, but sometimes speakers are responsible for setting up and manning "back of the room" tables for one-on-one meetings or collateral distribution.



FOOD, BEVERAGE, SIGNAGE

A comfortable socializing environment includes food and drink. Tie the offerings into your event theme and consider the time of day or the season, such as serving hot dogs for a baseball-themed event in the summer. Add themed signage outside the building and in each area where customers will stop for a presentation, tour, registration, and rest rooms.

You might include a backdrop reinforcing branding and the event theme while encouraging video and picture taking (and social sharing!). If your company does not have internal capabilities to create signs and banners, you will need to factor in time and budget to get signs produced externally.



SAMPLES, GIVE-AWAYS, RAFFLES

Use promotional products for raffles and prizes. They are an excellent way to create memorable interactions with the attendees and to reinforce your brand. We recommend selecting promotional products that are useful and demonstrate your capabilities.

Conferences featuring “back of the room” tables or small exhibits may offer the opportunity to hand out branded items like calendars, pens, t-shirts, or coffee mugs.

NETWORKING STRATEGIES

Coach your sales, client service, and key managers to facilitate networking among the attendees. This interactivity can dramatically contribute to a successful event. Attendees may know only one or two people from your company. We strongly recommend scheduling an internal planning session when the attendee list is nearly final. Give your client service and sales teams time to plan for introducing customers to key staff members and other attendees who could find value in meeting each other.

CLEAN SWEEP

A customer event is often the driver for finally attending to maintenance and general cleaning tasks overlooked during busy production periods. Improvements may involve paint, carpet and floor cleaning, tidying up areas where you regularly store materials or supplies, and updating internal signage. Arrange materials and pallets to allow enough space for guests to move from one area to another and brighten the lighting.

LOCAL EVENTS AND OPEN HOUSES

PLANNING

You may host a live event at your own facilities or at a separate venue, depending on your objectives and your budget. Many of the steps necessary to achieve success are the same.

Creating and hosting your own live event gives you the most control over the subject matter and superb access to your audience.

Goals for these types of events typically include attracting new customers, promoting a new service, or expanding business relationships with existing customers.

To prepare for these types of events, follow these steps:

1. Decide on the topics and format (industry, application, or partner focused)

2. Determine the day and time of the event. Consider:

- a. Length of time to present the topics
- b. Time of day when your audience will be available
- c. Travel time for distant attendees
- d. Disruption to your operations
- e. Cost for all-day vs. half-day
- f. Guest speaker availability

3. Select a venue

- a. Estimate the space necessary
- b. AV equipment needs
- c. Seating
- d. Convenient location
- e. Easy access
- f. Parking
- g. Food and beverage

4. Determine your budget. Consider creative ways to bring costs down.

- a. Co-sponsors
- b. Partners
- c. Bartered business services

5. Book your speaker(s).

A dynamic speaker can deliver your message and boost attendance. Potential speakers can include experts, authors, customers, or partners. When budgets are tight, you may have to limit speakers to in-house or local resources but do not underestimate the drawing power of speakers that can draw an audience. A sparsely attended event due to low value speakers can be an expensive waste of money.



ATTRACTING AN AUDIENCE

Besides the obvious groups of current and past customers plus local prospects, you can invite attendees from a variety of sources, depending on the profile of your desired audience. Local chapters of professional associations might promote your event to their members. Trade publications sometimes rent their lists or distribute advertisements to subscribers for a fee. List brokers are also a possible source.

Be sure to set up your Rsvp process in advance and set a deadline. A projected headcount will be necessary to rent an appropriate number of chairs, food, beverages, and promotional items you plan to give away. Typically, you'll use a registration form that resides on a landing page for your website to handle Rsvp's, but you could use simpler methods. A reply card provided as part of a direct mail package or an email link for electronic communications might serve your purpose.

When requesting information on a registration form, minimize the amount of data you ask attendees to provide. This is not the place to extract information such as the number of employees or annual marketing budgets. Save the deep dive into those details for when you can meet in person. The object of the invitation is to get people to sign up for your event. Avoid requiring them to fill out a long registration form, which will discourage possible attendees.



Don't be discouraged if you are not swamped with an overwhelming response when you send your invitations. Typically only half of the people you invite will respond and even fewer will attend. Plan on sending second and third invitations to encourage as many interested individuals as possible.

Live events are a superb opportunity to spend dedicated time with your local customers and prospects. Coach your salespeople and account representatives to mention your event and get local individuals signed up.

Generate some PR. Publicity can help you promote your local event to otherwise unapproachable audiences—and educate people about your products, technologies and capabilities, even if they don't attend.

LOGISTICS

When hosting your own event, all the details that can make the day a success are your responsibility. Here are a few items to address.

1. Prizes and giveaways

Giveaways can continue to remind an attendee of your company long after the event concludes. Small items such as branded pens, mugs, and USB flash drives are ideal. For door prizes and raffles you'll probably want to invest in higher value gifts such as iPads or other electronic devices.



2. Order event signage

Colorful signs will help your event look professional. See the Swipe Files for examples of directional signs, podium signs, or pull-up banners.

3. Order catering

Settle on a menu, but negotiate the option to report your final confirmed attendance as close to the event as possible to avoid over or under ordering. Order food easy to serve and eat. Consider light hors

d'oeuvres or a simple meal depending on the time of day and length of your event.

4. Be sure to collect feedback

Feedback will be invaluable in determining how well you engaged your audience. One of the best times to collect attendee reactions is right at the event.

5. Thank attendees and speakers

After hosting your local event, be sure to send thank-you correspondence to all attendees and participants. Do this within a week of the event. Consider sending a quick note to customers who could not attend, expressing your wish to see them at your next event. We've provided a suggested thank-you note for reference.

MARKETING DURING YOUR EVENT

You may think once your event starts, you have finished your marketing tasks. However, plenty of marketing opportunities are available to you during the event.

Naturally the main presentations will be your prime consideration. Whether a success story, demonstration, or a lineup of guest speakers, this will be the moment when you have the undivided attention of your customers, prospects, and even industry reporters. Nobody comes to an event to hear a sales pitch though, so keep the sales speak to a minimum.

When media reporters and industry analysts cover your event, they distribute your message to a wider audience. You can attract such people by sending press packs ahead of the event and calling them personally on the phone or through personal emails to invite them. Make time during the event to answer questions and provide media representatives with individuals to interview. Be sure to have current relevant collateral on hand.

Your event is also a bountiful source of content you can use later. Record some video, take pictures, and gather attendee quotes and comments. You'll be able to use these items for post-event follow-up and for months thereafter. Assign a social-savvy employee to snap photos and post comments and updates online in real time as the event progresses. Be sure they use the assigned event hashtag.

Even more powerful is content generated by the attendees. Set up a photo opportunity area with a background promoting your company and encourage attendees to take pictures and share them via social media. Suggest hashtags to use.

The time spent with customers and prospects is the most valuable part of the event. Personal interaction is the most powerful marketing tool at your disposal. It pays to be prepared to take advantage of this opportunity. Arrange time to interact with everyone invited. Divide the responsibility among the staff and make sure they each know their assignments. Make staff people accountable for personally contacting the prospects, customers, or media to whom they are assigned.

Someone should stand at the entrance at all times to greet attendees as they arrive. This is also a great time to update or append the contact information you have on file for them.

POST EVENT MARKETING AND FOLLOW-UP

One of the best times to build on your success and strengthen the impression you've made is right after the event. One of the first things to do is send out thank you communications. Thank your staff that helped put on the event and your guest speakers. For seminars or webinars where you were a featured speaker or panelist, then thank the sponsor.

Of course you will connect with customers or prospects who attended. Reinforce the messaging delivered at the event, build on the relationship, and keep communications open. For events you did not hold on your own, inquire with the event sponsor to see if an attendee list is available and ask permission to contact them.

Use the time after your event to update your CRM with new customer information you gathered. If multiple staff members spoke to customers and prospects, have



them record notes from their conversations in the CRM. Make plans to follow up with any new leads personally.

Invited parties will fall into three categories:

1. Those who attended
2. Those who registered but did not attend
3. Those who were invited but did not register or attend

The follow-up messages to each group will be slightly different. Assume no-shows who registered have a higher level of interest in your company than those who did not respond to the invitation at all. Follow up with the registered no-shows more aggressively to start a conversation. Email drip campaigns are good for this purpose. Send slide decks from the presentations, written copies of case studies, or offer to meet with these customers personally.

For the group that did not respond to your invitations, a brief recap of the event and photos or videos will let these individuals know what they missed. Invite them to reach out to you and let them know you'll be looking forward to meeting them at your next event.

Sending out a post event press release to local business publications is a nice touch and lets the public know about the details of your event, including turnout numbers, what topics were covered in the presentations, and attendee reactions. This action will give your event extra coverage and can help attract more attendees the next time around. See the Swipe Files for an example of a post-event press release.

Finally, review the goals and metrics you established during the planning stage. Quantifying your ROI may take time, especially as sales cycles can sometimes take months, but you can capture all your costs at this point and start the measuring process. You will also be able to hold a formal debriefing with management and staff to share your successes and lessons learned, so you can make adjustments for your next event.

CAPTURING AND REPORTING RESULTS

Apart from reviewing comments you receive during and after the event, Gimbel & Associates recommends making a few simple calculations to highlight features that worked and those that could use some improvement for your next event.

1. Attendance ratio

Divide the number of attendees by the number invited. Use 25% as a benchmark. If your ratio is higher than the benchmark, you've done well. If lower, try to determine why individuals did not respond.

- a. Event program was not relevant or compelling enough?
- b. Bad timing?
- c. Insufficient promotion?
- d. Not enough incentives (food, door prizes)
- e. Speaker choice

2. Generated revenue

Sales are the number one statistic for measuring event success. If you made more money through sales than you invested in your event, you can consider it successful. Actual tracking can be tricky though, as deals and programs can close months after the fact. Identifying new sales opportunities and tracking them for six to nine months after the event is the strategy we recommend to calculate an ROI.

Ed Jones's "How to Measure the Value of a Trade Show Program,"* suggests you can make a reasonably accurate estimate of how successful your event was by using a few commonly accepted assumptions.

- a. Count the hot leads - Identify the number of attendees who have committed to a sales contact or other specific sales-related step after your event.
- b. Determine your close rate - Your close rate is the average percentage of closed sales per hundred sales calls.

- c. Estimate your average revenue per sale - Big or small, this computation will be the average price of your offerings available for sale.

Use the following equation to calculate estimated revenue:

Number of Leads x Close rate x Average value of sale or contract = Estimated revenue from event

Since the formula is based on real statistics and data-backed sales assumptions, this calculation can provide you with a reasonable snapshot of the potential revenue generated by your event.

* Based on the EXHIBITOR SHOW 2005 event: ["How to Measure the Value of Trade Show Participation"](#) by Ed Jones.

HINTS AND TIPS

Plan as early as possible

One of the most important keys to successful event planning is starting early and making arrangements far ahead of time. Give yourself enough time to ensure everything comes together smoothly.

Size your event according to your audience

When planning your event, make sure you size it in relation to your audience, the content you are delivering, and your desired outcomes. For example, attracting large crowds may not be the best strategy if your aim is to motivate prospects stalled in the sales cycle. A smaller engagement will allow you to spend more time and give each prospect individual attention. Quality attendees whom you can have meaningful conversations with will yield better long term sales opportunities than having lots of people fill the room.



Be creative about attracting your attendees

During the planning process, think about creative ways of communicating with your audience, getting their attention, and involving them in the event. This is especially important if part of your program will focus on personalized or multi-channel communications. Use these techniques to enhance the effectiveness of your own campaign. A clever design and creative copy that gets attendee attention could be the best advertising investment.

Follow up

Once you have mailed your invitations, be sure to follow up with friendly e-mails or other materials to non-responsive recipients. This strategy will increase overall attendance. Be sure to filter individuals who have Rsvp'd from previous invitation campaigns.

Personally welcome attendees

Make sure a company representative greets customers as they walk into the venue. This lets attendees know they're in the right place and helps orient them.

Keep attendee badges orderly

Most event organizers arrange name badges on a table in alphabetical order. When attendees pick them up the badges scatter across the table. Instead, keep the name badges neatly organized behind your registration area and hand them out only when an attendee stops by to register, or make sure registration table employees keep reorganizing the badges to keep them orderly.



Be sure signage is up and correctly placed

Check at various times throughout your event to make sure your signs are still up, unobstructed and correctly pointing attendees in the right direction.

Plan sufficient breaks between presentations

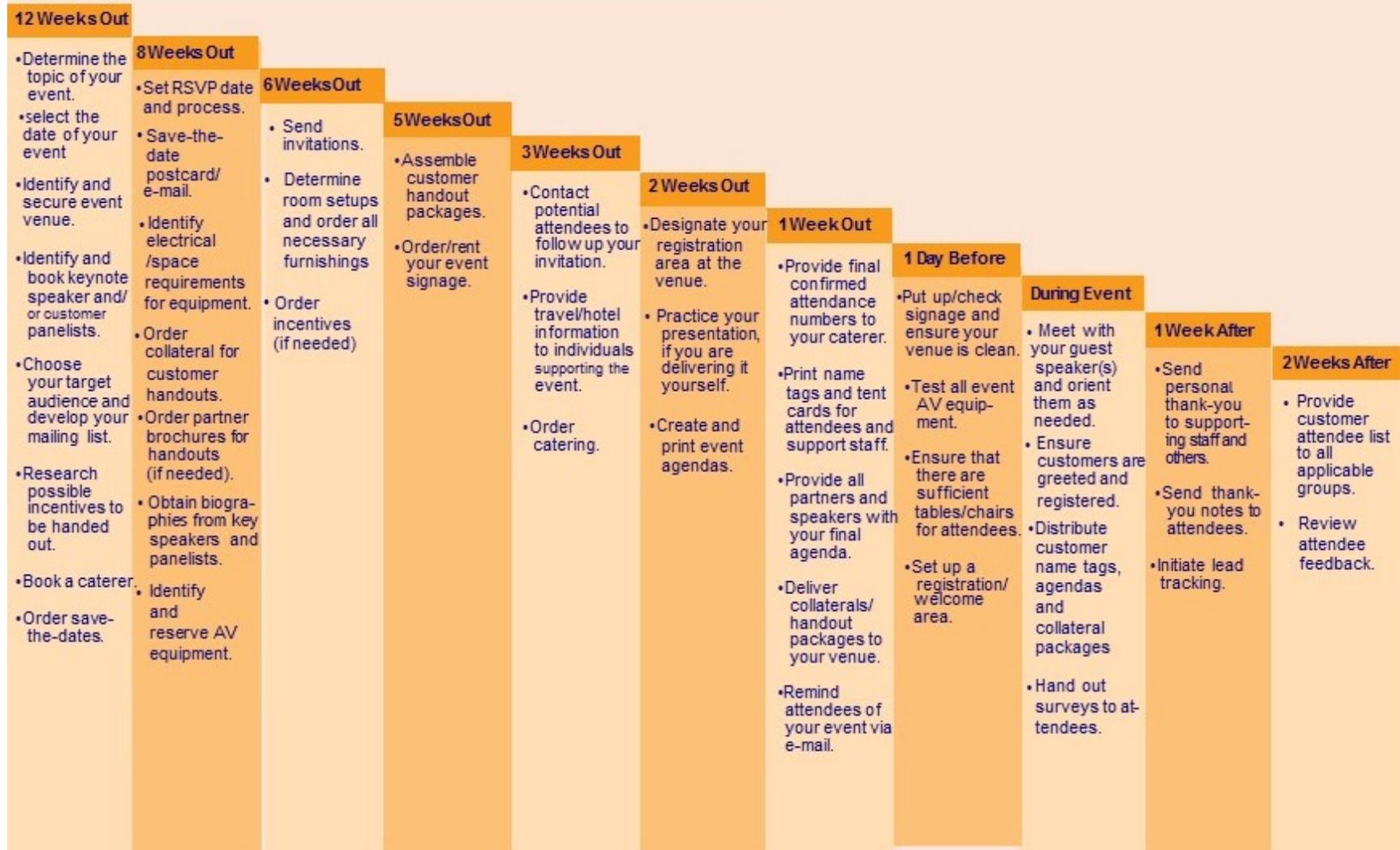
Allot time for breaks during your event. Fifteen minutes per break is usually sufficient for attendees to get refreshments, check their emails, and use the rest rooms.

Provide speakers with a place to prepare

It's a nice courtesy to arrange for a separate, private room for your speakers to get ready for the presentation and review their notes. Refreshments (bottled water, fruit, etc.) are a nice touch.



Timetable - Local Hosted Events



SEMINARS, WEBINARS, CONFERENCES



PLANNING & LOGISTICS

A seminar or conference is an ideal way to introduce your services and solutions to a wider audience. This can be especially effective for attracting new customers as it gives you a chance to establish your company's position in the industry and demonstrate how you stand out from the competition.

Since the host organization will handle most of the logistics, taking part in a seminar is a fairly straightforward process. This leaves you more time to focus on preparing and polishing your presentation so everything will go smoothly when you get on the physical or digital stage.

That said, here are a few important steps you should take to make sure your presentation is a success.

1. Nail down your purpose for participating

Be 100 percent clear on why you want to make your presentation. Is it to gain new customers? Promote a new service of your own? Are you supporting an organization, customer, or partner as a user or beneficiary of their work?

One way to bring your purpose into focus is to describe what you want people to do when your presentation is over. The answer to this question will identify your reason for participating. Those who play a part in events without first answering this question invariably leave feeling they have wasted their time.

2. Invite guests

Seminars are great opportunities to touch base with your existing customers and connect with prospects, if the seminar location is convenient for them. Let them know about your presentation and be sure to remind them when the seminar date gets closer.

The event's host organization will welcome attendees drawn from your contact network and be grateful to you for contributing to the attendance list. You are likely to receive invitations to speak at future seminars as a result.

3. Send in completed paperwork/fees well ahead of the deadline

Once you've decided to participate, make sure all your paperwork is in order and any registration fees paid promptly.

4. Rehearse and time your presentation

Be courteous to fellow presenters and do not dominate the event, but include enough useful content to make your portion of the event memorable.

5. Provide seed questions for the Q and A portion of the program

Events that end with no questions are embarrassing. A few thought-provoking questions prepared in advance will often prompt attendees to ask questions of their own.

6. Ask the organizers to share attendee information with you

Are there lots of people attending from manufacturing companies? Health care organizations? Knowing this ahead of time can help you add a local angle to your presentation and ensure the content connects with the expected audience.

7. Will you be presenting slides?

Ask the organizers about audio/visual equipment and be sure your presentation is compatible. Avoid content that requires an internet connection if possible. Embed content such as videos directly into your slide deck instead.

In some cases, you'll be asked to add your content to an approved slide template format. Be sure your text and graphics will fit and pay attention to slide dimensions. Material designed in a 4 by 3 ratio, for instance, will be distorted if shown in the wider 16 by 9 orientation.

For webinars, be sure you'll have a strong internet connection. Consider using a wired connection rather than relying on Wi-Fi. If you will be on camera, arrange for adequate lighting and a clean, businesslike background. Eliminate ambient noise and interruptions during the session. Test microphones and cameras. Use a land line for phone connections if possible.

PARTICIPATING

1. Determine if there will be a table for presenters

Some seminars provide space for presenters to further engage audiences before and after their talk. Find out if this is the case well in advance as you want to prepare for the additional face time.

- Have relevant collateral on hand that supports the topic of your presentation
- Be sure to have enough business cards to hand out
- If attendees will be able to visit tables while presentations are going on, be sure to have your table manned by another employee

2. Have surveys printed and ready to distribute to attendees who stop by.

This is a great way to get feedback while your presentation is fresh in their minds and can help you refine your message for future seminars. We've created a survey template for you to help collect feedback. You can find it in the Swipe Files at the end of this book.

Timetable – Seminars, Webinars & Conferences

12 Weeks Out	8 Weeks Out	6 Weeks Out	4 Weeks Out	1 Week Out	Upon Arrival	During Seminar	1 Week After	2 Weeks After
<ul style="list-style-type: none"> • Determine your goal for participating. • Send in seminar application and/or fees • Order save-the-date postcard/email. 	<ul style="list-style-type: none"> • Make airline, hotel, and car reservations. • Plan your presentation. • Send save-the-date postcard/e-mail. • Order any collaterals or additional business cards, if needed. 	<ul style="list-style-type: none"> • Send invitation to guests. • Order staff badges. 	<ul style="list-style-type: none"> • Double-check airline and hotel reservations and travel dates. • Practice your presentation. 	<ul style="list-style-type: none"> • Practice your presentation. • Have collaterals/handout packages delivered to the venue, or pack to bring with you. 	<ul style="list-style-type: none"> • Set up your table, if provided. 	<ul style="list-style-type: none"> • Hand out a survey to all attendees, if table provided. 	<ul style="list-style-type: none"> • Send thank-you notes to staff and host organization. • E-mail survey, if not able to hand out at the seminar. • Initiate lead follow up and tracking 	<ul style="list-style-type: none"> • Review attendee feedback.

SAMPLE RECOMMENDED MATERIALS

DETERMINING EVENT OBJECTIVES WORKSHEET

DETERMINING EVENT OBJECTIVES WORKSHEET	
Name of event	
Date and time of event	
Location of event	
Target audience – who <ul style="list-style-type: none">• <i>Which group is the targeted attendee?</i>• <i>What does the audience need/want to know?</i>• <i>What will hold their interest?</i>	
Message – what <ul style="list-style-type: none">• <i>What do you want to say to the target audience?</i>• <i>What do you want them to know/do?</i>	
Objectives – why <i>Be clear about what you hope to achieve with this event – actionable & measurable</i>	

PRE-EVENT PRESS ANNOUNCEMENT

SAMPLE: Event Press Release - Use company letterhead

Contact Name
Title
Organization Name
Phone Number
Cell Phone Number
Email

For Immediate Release:

Event Name

<Your company name> is holding a <type of event> called <name of event> at <time>
on <date> at <place.>

<Insert a description of the event: who it's for, what will happen, what will be handed out,
gifts or prizes, etc.>

<"Insert quote from event representative,"> said <Event rep's name, title> for <agency/event
name.>

To register for this event, contact <event contact's name> at <phone number>. For
more information about <company name>, visit <website> or call <phone number.>

POST EVENT PRESS ANNOUNCEMENT

Sample After Event Press Release - Use Company Letterhead

Contact Name
Title
Organization Name
Phone Number
Cell Phone Number
Email

For Immediate Release:

Event Held to (your event objective)

<your company name> held a <type of event> called <name of event> on <date> at <place.>

During this event, <insert a description of the event: who and how many attended, what happened, what was handed out, etc.>.

<attach pictures of your event featuring attendees participating with speakers and include any quotes or accolades from the participants along with their name, title and company>

To learn more about <your company name> products and services, contact <your company rep> at <phone number and/or email>.

If your company website has a blog, newsletter or press page be sure to include your post press release or article on it!

PRESS PACK

Press packs serve two purposes:

1. Provide reporters, analysts, and writers enough information and content they can write about your event in advance and create a buzz about what you'll be doing.
2. Entice reporters, analysts, and writers to attend and cover your event for their readers and followers.

The content you decide to include in a press kit should be related to your theme. If you are promoting personalized communications, for example, add several variations of personalized postcards, self-mailers, or letters. If touting a new digital inkjet press, you might include some annotated print samples in addition to a brochure that describes the features of the equipment and explains how it will benefit your clients.

You'll also want to include background information about your company, speaker biographies, agendas, photos, graphics, previously published relevant news items, and the pre-event press release.

Be sure all material is properly branded and coincides with your event theme.

Use anonymous data for your samples. Take care to avoid distributing any real information or using any client artwork or projects in your press kits without client permission.

AGENDA

OPEN House
Event Name

<day/month/year>
<location address>

time	Introductions and Agenda Review	speaker name
time	Plant/company tour/Production Floor Demonstrations	Customers
time	Marketing your Services	speaker name
time	Sales management for digital success	speaker name
time	Wrap Up	
time	Refreshments	

your company logo

SAVE THE DATE POSTCARD

your logo here



Customer Open House

<date>

IN <CITY Location>

INVITATION TO FOLLOW

*Save
the
Date*

EVENT INVITATION EMAIL



Subject line: <Name>, Learn how to hit your marketing and sales goals!

your logo here

Dear <Name>,

Our <Open House> is happening in (X) days. We want to make sure that you have a ticket to win a <special gift> and other cool prizes.

Register Here. Link to www.purl.com.

You'll have the opportunity to network with industry peers, meet the team that supports <client company name> and learn how you can leverage us to achieve your key business objectives.

Topics include:

- Industry insight: new communication and mailing services strategies
- Customer led discussion: effective lead generation / sales conversion campaigns
- Brand management: the value of consistency and e-Commerce Solutions

Reserve your ticket today!
www.purl.com

<day/date/year>
<time>
<company name and address>
My direct line - < xxx.xxx.xxxx>

We look forward to seeing you on <day/date>!

<CSR / Sales Rep Name>
<Contact information>

DIRECT MAIL EVENT INVITATION POSTCARD



Your logo and return address here



Services: Direct Mail and Fulfillment | Mail Optimization | Digital Print | Wide Format
Integrated Solutions: Cross Media Campaigns | eCommerce Solutions | Web-to-Print Portals

TENT CARD



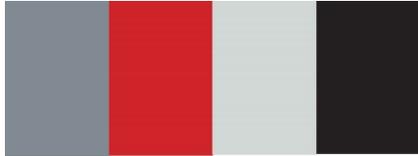
A tent card template with a header consisting of four colored rectangular blocks: dark grey, red, light grey, and black. Below the header is a white area containing two horizontal lines for text entry. The first line is preceded by the text "My name is" and the second line by "Company". In the bottom right corner of the white area, the text "your logo here" is written in red.

My name is _____

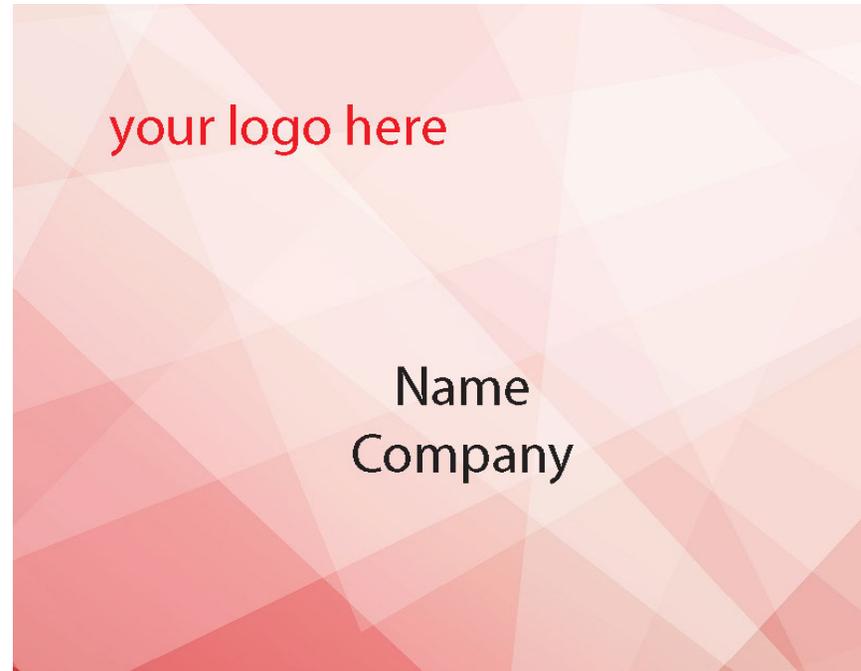
Company _____

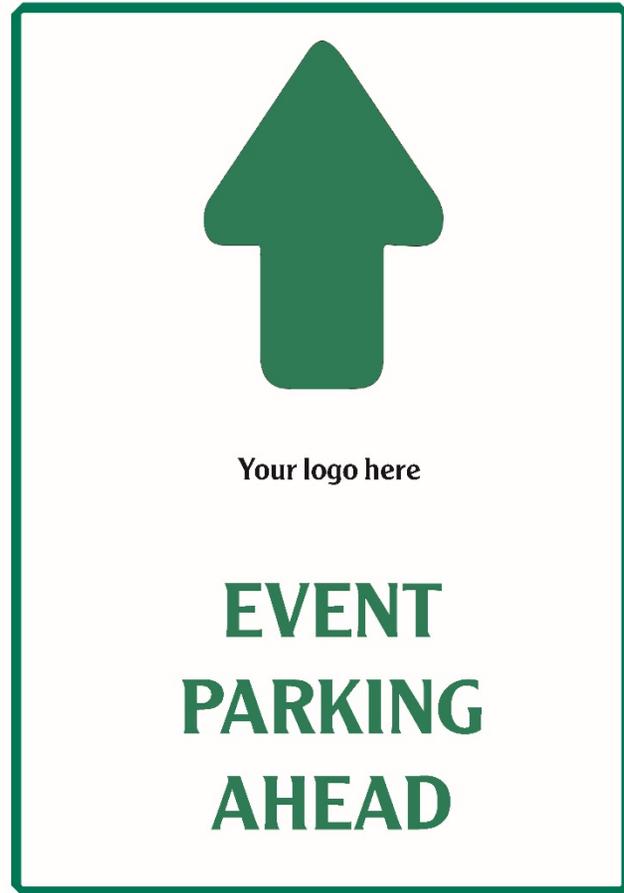
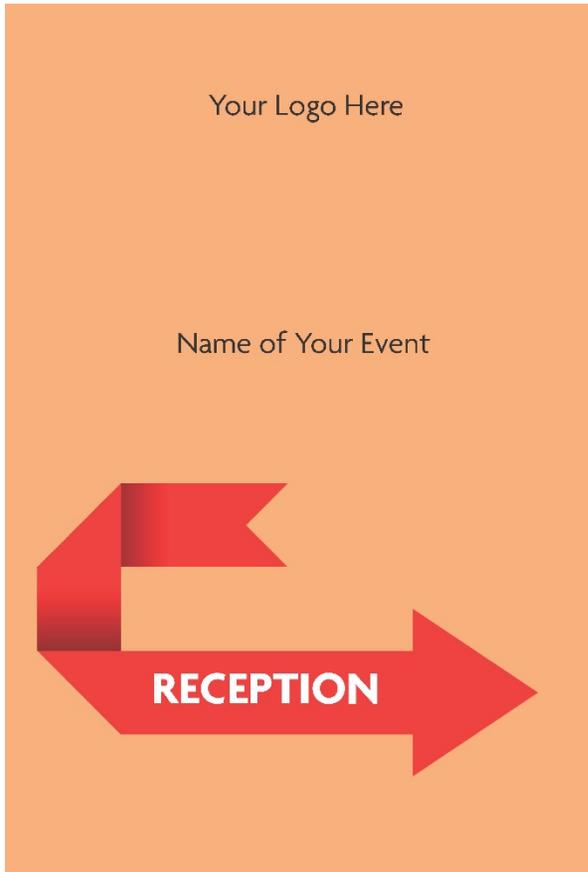
your logo here

SIGNS AND NAME TAGS



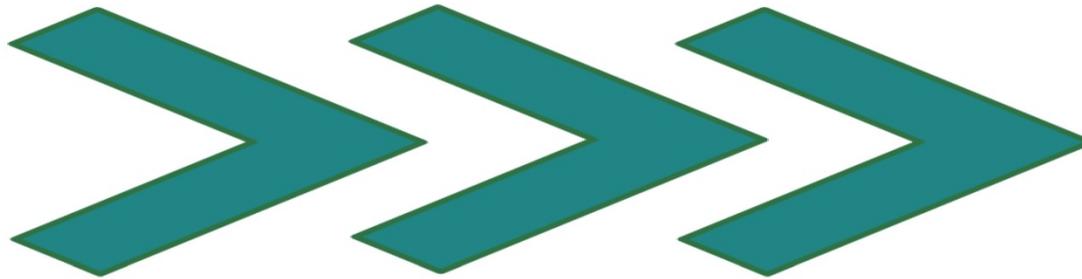
YOUR LOGO
HERE





EVENT PARKING

YOUR LOGO HERE



FEEDBACK SURVEY

<NAME OF EVENT> FEEDBACK FORM

Date: _____ Event Name _____

This survey enables you to provide feedback on the value and outcomes of the event you have just attended.

[insert appropriate questions relating to the event to inform your evaluation]

Please indicate the extent to which you agree with the following statements

	Strongly DISAGREE	DIS-AGREE	neutral	AGREE	Strongly AGREE
1. Information provided at this event is relevant to you	1	2	3	4	5
2. You are likely to use this information in the future	1	2	3	4	5

Comments:

3. Resources provided at this event are relevant to you	1	2	3	4	5
4. You are likely to use these resources in the future	1	2	3	4	5

Comments:

5. Presentations were interesting	1	2	3	4	5
6. You would recommend this event to others	1	2	3	4	5

Comments:

7. There were opportunities to network with other stakeholders	1	2	3	4	5
--	---	---	---	---	---

Comments:

8. Overall, the event was worthwhile	1	2	3	4	5
--------------------------------------	---	---	---	---	---

Comments:

9. The venue was suitable

1	2	3	4	5
---	---	---	---	---

10. The venue was easy to get to

1	2	3	4	5
---	---	---	---	---

Comments:

11. Refreshments were suitable

1	2	3	4	5
---	---	---	---	---

Comments:

12. What are the two most useful things you got out of the event?

13. How could the event be improved?

14. Please identify any specific priority areas for you that could be the focus at future events.

15. Other comments

THANK YOU FOR YOUR FEEDBACK

THANK YOU NOTE

Subject line: <Name>, We hope that you enjoyed your time networking			
your logo here			
Dear <Attendee Name>,			
Thank you for attending our Customer Open House! We had a wonderful time visiting with old friends and meeting new customers. We hope that you enjoyed your time networking and hearing new ideas and strategies to help you realize your Business Objectives.			
If there are specific projects that I can support you with, please contact me so we can arrange a call or meeting to discuss further.			
<CSR / Sales Rep Name> <Contact information>			

ABOUT GIMBEL & ASSOCIATES

GEARED TO YOUR SUCCESS

We're an international management consulting firm working to ignite business growth through digital technologies. As an independent company, we offer clients customized consulting services to achieve their sales and marketing goals.

We provide consulting engagements in the following areas:

- Business development
- Sales strategy
- Sales training
- Digital implementation
- Strategic planning
- Marketing plans
- Workflow analysis
- Integrated marketing services
- Variable data
- Data analytics
- Micro Modeling
- Software deployment
- Customer workshops



With our extensive background in print production, digital, inkjet, workflow, marketing communications, training, and direct marketing, we help our clients accomplish their growth and efficiency goals.

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ASSOCIATES